






If the customer insists on renting from a room with a high occupancy rate in the red range, use the phone number displayed on this page to call the center. Find out how likely the customer would be to rent the room size he or she wants at the time they need it. The center may want to complete the reservation on their computer over the phone to assure the customer that the room will be available when they want to move in.


If the customer wants to check another city, click  to return to the city page. Select another city and review its centers' occupancy rates.



Entities that accept remote reservations show a blue arrow icon  next to the center record. If the red, not sign  icon displays next to a storage facility, call the center, or give the customer the center's phone number and see if the center would want to complete a LOCAL RESERVATION from their *WebSelfStorage* application.




To select a center using the mouse:

1. Click the blue-arrow icon  next to that center.



To select a center using the keyboard:

1. Press TAB until the cursor is over the blue arrow icon  next to the center.
2. Press ENTER to select.

Reviewing the entity specific screen

The **SELECTING SIZECODE** page provides you with a wealth of information.


The **SELECTED ROOMS** section of the page grows as you add room sizecodes to the contract.

Customer	Location	Room	Move-In Date	Payment					
↑									
Selected Rooms									
SIZE	PRODUCT	FL	ELEV	CLIMATE	BONUS	SQ.FT.	RATE		
There Are No Rooms Currently Selected									
Move-In Date: 7									
Available Rooms									
Room/Unit Occupancy Chart									
SIZE	PRODUCT	FL	ELEV	CLIMATE	BONUS	SQ.FT.	VACANT	%OCC	RATE
5X10X10	MDH	1	OUTSIDE	NOCLIMATE		50	0	100%	\$54.95
5X10X10	INTERIOR	1	SINGLE	CLIMATE		50	3	91%	\$39.95
10X10X10	MDH	1	OUTSIDE	NOCLIMATE		100	0	100%	\$69.95
10X10X10	INTERIOR	1	SINGLE	CLIMATE		100	30	66%	\$79.95
10X15X10	MDH	1	OUTSIDE	NOCLIMATE		150	4	93%	\$89.95
10X20X10	MDH	1	OUTSIDE	NOCLIMATE		200	0	100%	\$119.95
Occupancy Percentage Range Bar									
<div style="display: flex; justify-content: space-between; width: 100%;"> 0% 88% 100% </div>									
Reservation For Room Occupancy Below 1 Is Not Permitted									
<input checked="" type="checkbox"/> = Selects A Size <input type="checkbox"/> = No Units Available In This Sizecode <input type="checkbox"/> = Removes A Selected Size									


The AVAILABLE ROOMS section of the page displays all sizecodes at this facility



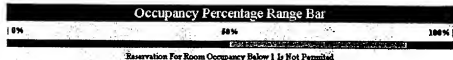
Several visual cues on this screen help you determine if there are rooms in a particular sizecode available to rent. The list of available rooms provides the following information:

- The **SIZE**, **PRODUCT**, **FLOOR**, **ELEVATION**, **CLIMATE**, and **BONUS** description.
- The square foot available in each sizecode.
- The number of room currently vacant.
- A percentage that indicates the number of rooms currently rented in this size as compared to total rooms of this size (rooms rented for this sizecode / total rooms for this sizecode * 100 = occupied percentage of total rooms.)
- Each line shows a small colored box next to this percentage. This visual cue tells you whether the sizecode has available rooms to rent. The Marketing Storage Production Group at U-Haul International sets percentage guidelines within the application that control this display.
 - ■ Green indicates that there are rooms available to reserve and rent. At the start of each line with a green indicator, you will find a blue-arrow icon . If the customer wants this size room, simply click on this arrow to continue.
 - ■ Yellow indicates that there are rooms available to reserve, but that caution should be used in reserving this sizecode. Too many reservations will cause this entity to run out of

rooms leaving customers with reservations and unable to rent the size they requested.

- Red indicates that there are no rooms available. At the beginning of lines with this red indicator, notice a not available icon . You cannot select this size room.
- The rental rate enables you to quote the rate to the customer.

A visual PERCENTAGE BAR at the bottom of this page shows the distribution settings.




In this example, the green range represents room rental occupancy of up to 50%. The yellow, or caution range, reflects room rental occupancy of between 51 and 90%. Any sizes with occupancies above 90% cannot accept new reservations.



In addition to this PERCENTAGE BAR, notice the message under it. This tells you that an additional control does not permit reservations once occupancy reaches a set number of rooms.




To select a sizecode using the mouse:

- Click the blue-arrow icon  to the left of the sizecode the customer wants to reserve.



To select a sizecode using the keyboard:

- Press TAB until the cursor is over the blue-arrow icon  to the left of the sizecode the customer wants to reserve.
- Press ENTER.

The MOVE-IN DATE page requires you type the date the customer plans to move into the room. A MOVE IN DATE is required for both quotes and confirmed reservations.

Customer	Location	Room	Move-In Date	Payment			
Selected Size							
SIZE	PRODUCT	FLOOR	ELEV	CLIMATE	BONUS	SQ.FT.	RATE
10X10X10	INTERIOR	1	SINGLE	CLIMATE		100	\$79.95

Input The Move-In Date

Date: / /



(Access Key: C) (Access Key: S)


Date format is MM / DD / YYYY

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The FEES DUE page displays. Since this is a QUOTE, no money is collected. Make sure to tell the customer what the BALANCE DUE amount is. You can also print this page if necessary.



Customer	Location	Room	Move-In Date	Payment
Fees Due				
SIZE	DESCRIPTION	FEE	TAX	TOTAL
10X10X10	RENT DEPOSIT	\$79.95	\$0.00	\$79.95
Balance Due:				\$79.95

 (Access Key: T)
 (Access Key: M)

Click  or press ALT + M to continue.

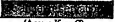

Quote reservation

The RESERVATION page displays. Notice the ACCOUNT TYPE field indicates this is a QUOTE. This page is very similar to the RENTAL AGREEMENT PAGE already discussed.

WebSelfStorage **RESERVATION**  

BALANCE DUE: \$79.95 MOVE-IN DATE: 6/22/2001 ACCOUNT TYPE: QUOTE RES NO: 828068-00000008

!! Customer Information
!! Location
!! Room Information
!! Payment


 (Access Key: C)  (Access Key: S)


Here are two hypertext links to related section of the user's manual.



To review the meaning of the icons at the top, right corner of the RESERVATION page, click [Icon Descriptions](#).

To review information about the RENTAL AGREEMENT page, click [Rental Agreement Page](#).


Click  or press ALT + S, to complete the RESERVATION QUOTE.

1. Click on the dollar icon  in the upper, right corner of the page.

Collect the
Balance Due
from the
customer.

Review **TAKE
PAYMENT** if
necessary.



Customer	Location	Room	Move-In Date	Payment
Fees Due				
SIZE	DESCRIPTION	FEE	TAX	TOTAL
10X10X10	RENT DEPOSIT	\$79.95	\$0.00	79.95
Balance Due:				\$79.95
Select Payment Type				
Payment Type: 				

(Access Key: B)

(Access Key: X)



Review finishing a CONFIRMED RESERVATION by clicking [here](#).

[Go to Confirmed Reservation](#)

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Completing a confirmed reservation



A CONFIRMED RESERVATION requires the customer pay a deposit to hold the room.



The same pages are used as a QUOTE. To walk through the process, see Completing a reservation quote. The difference comes at the point where you collect money.

On the FEES DUE page,
click on



or press ALT + T to
continue.

Customer	Location	Room	Move-In Date	Payment
Fees Due				
SIZE	DESCRIPTION	FEE	TAX	TOTAL
XXXX	RENT DEPOSIT	\$5.95	\$0.00	\$5.95

Balance Due: \$5.95

(Access Key: T)

(Access Key: M)

The Select
Payment Type
displays at the
bottom of this
same page.

Customer	Location	Room	Move-In Date	Payment
Fees Due				
SIZE	DESCRIPTION	FEE	TAX	TOTAL
10X10X10	RENT DEPOSIT	\$79.95	\$0.00	79.95

Balance Due: \$79.95

Select Payment Type

Payment Type: Choose...

(Access Key: B) (Access Key: X)



Click [here](#) to review procedures on taking payment.

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Payments



A customer can pay for a reservation deposit, rental or other service using any of the traditional TENDER TYPES including:

Cash

Check

Credit Card

Money Order



From time to time, a customer may also want to redeem coupons given to them by your center or another U-Haul facility as a good will gesture to assure their continued patronage. Both A. T. & T and VIP Coupons can be deducted from the total amount owed.

Certain types of customers also have special PAYMENT TYPES. Such CUSTOMER TYPES include:

System Use

Corporate Account



Whenever you click **Make Payment** or press ALT + T, the SELECT PAYMENT TYPE section of the FEES DUE page displays.

The SELECT PAYMENT TYPE section of the FEES DUE page displays.


Customer	Location	Room	Move-In Date	Payment
Fees Due				
SIZE	DESCRIPTION	FEE	TAX	TOTAL
10X10X8	RENT DEPOSIT	\$109.95	\$8.80	\$118.75
Balance Due:				\$118.75
Select Payment Type				
Payment Type: THOSE...				


(Access Key: B) (Access Key: X)



Exiting Check
Payment

The other two buttons on this page enable you to exit the check payment process when necessary.

Click  to return to the FEES DUE page.





Click  to return to the CHECK TYPE page.



When the CHECK INFORMATION page displays, if the check was swiped, the BANK NUMBER, CHECK NUMBER and ACCOUNT NUMBER fields are filled in by the application.

If you typed the *driver's license information* on the CUSTOMER INFORMATION page at the beginning of the contract, this information displays in the DRIVER'S LICENSE INFORMATION section of the CHECK INFORMATION page.

The
BUSINESS
check page
requires the
check number,
bank number,
amount of
check, and
bank account
number.

Customer	Location	Room	Move-In Date	Payment
Check Information				
↑				
Customer's Check				
Check Type: Business		Total Due: \$142.51		
Check Number: 		Amount: 		
Bank Number: 		Account Number: 		



  
(Access Key: B) (Access Key: C) (Access Key: D)

Recording coupon redemption



Redemption of a coupon requires you select the type of coupon, enter the coupon number, and record the amount of the coupon.

Customer Contact Access Users Room Gate Access Payment Plan Invoicing **Payment**

Coupon Payment

Coupon	
	Total Due: \$21.59
Type:	Choose...
Coupon Number:	
Amount Collected:	

(Access Key: B) (Access Key: C) (Access Key: S)

Coupon



COUPON TYPES include:

Type: Choose...
 Number: Choose...
 Amount Collected: Choose...

- AT&T – U-Haul customers receive incentive information printed on their rental contract's ticket jacket to choose AT&T as their long distance service provider. Those who participate receive 100 free minutes of long-distance service and a U-Haul gift certificate to be used on rentals of self-storage rooms, equipment or trucks.
- VIP Certificate – An alternative to reimbursing cash, this provides incentive for the customer to use U-Haul products and services again. This certificate is valid for two years from the issue date. A U-Haul representative writes this issue date on the certificate before giving it to the customer. Certificates come in \$10.00 and \$20.00 increments.



To select a COUPON TYPE using the mouse:

1. Click on the  next to the COUPON TYPE to view all types available.
2. Click on the type the customer is redeeming.
3. Click in the COUPON NUMBER field.
4. Type the coupon number.
5. CLICK in the AMOUNT COLLECTED field.
6. Type the coupon amount.
7. Click .



To select a CREDIT CARD TYPE using the keyboard:

1. Press DOWN ARROW until the correct coupon type displays in the window.
2. Press TAB.
3. Type the *coupon number* in the corresponding field.
4. Press TAB.
5. Type the *amount of the coupon* in the corresponding field.
6. Press ALT + S.

Recording system use payment



Within the AMERCO corporation, there may be a corporate entity that needs a room to store inventory, assets, or other items. With the proper approval, the entity can complete a SYSTEM USE rental contract with an AMERCO corporate storage facility. The renting entity is considered a SYSTEM USE customer. "Orange dollars" record income to the storage center and expense to the renting entity. A PAYMENT TYPE is set up for this purpose. The only time this PAYMENT TYPE displays is when the CUSTOMER TYPE is designated at SYSTEM USE.

On the FEES
DUE page,
the only
PAYMENT
TYPE
available is
SYSTEM
USE.

Customer	Contact	Access Users	Room	Date Access	Payment Plan	Invoicing	Payment
Fees Due							
DUE	ROOM	DESCRIPTION		FEE	QTY	TAX	TOTAL
3/12/2001	202	RENT		\$150.00	1.00	\$12.00	\$162.00
Balance Due:							\$162.00
Select Payment Type							
Payment Type: SYSTEM USE							

(Access Key: B) (Access Key: X)



To record a system use payment using the mouse:

1. Click on the next to the PAYMENT TYPE to view.
2. Click on SYSTEM USE.
3. Click



To record a system use payment using the keyboard:

1. Press DOWN ARROW until SYSTEM USE PAYMENT TYPE displays.

E-94

Moving in



A MOVE IN can be completed by:

Recalling a CONFIRMED RESERVATION for a customer who previously reserved a sizecode and now wants to move in.

Starting a MOVE IN for a customer who did not complete a reservation before hand.



Confirmed reservation move in

Move in without a reservation

Moving in from a confirmed reservation



A CONFIRMED RESERVATION can be done in one of three ways.

You can complete a CONFIRMED RESERVATION from your *WebSelfStorage* application. See CONFIRMED RESERVATION for details on this procedure.



Another storage location can complete a remote reservation selecting your center as the facility that the customer will rent from.

The Sales & Reservation department at U-Haul International will complete confirmed reservations for your center.

The customer should have a storage reservation number. This is given to them over the phone, in the case of Sales and Reservations, or in person at the center in which they completed the reservation. This confirmation number is the contract number you need to view.

Existing Customer

Take A Payment

Move Out

View Contract


Transfer

Authorized Access

Clicking on VIEW CONTRACT under EXISTING CUSTOMER on the HOME or MAIN page to recall a CONFIRMED RESERVATION.




See Viewing a contract if you need instructions on getting to the RESERVATION page shown next.

Both of the above hypertext-linked pages provide a  button to return you to this page. Remember, you can also use ALT + B to activate this button using the keyboard.




To select a room using the mouse:

1. Click on the blue arrow  next to the room the customer wants to rent.



To select a room using the keyboard:

1. Press TAB until the cursor is over the blue arrow  next to the room the customer wants to rent.
2. Press ENTER.

The MOVE IN page requires you review the NEXT BILL DATE, and add any services.

Input The Next Bill And Expected Vacate Date						
Next Bill Date: <input type="text"/> / <input type="text"/> / <input type="text"/>						
Edit Date If Customer Request A Different Bill Date						
Vacate Date: <input type="text"/> / <input type="text"/> / <input type="text"/>						
Leave Blank If Vacate Date Is Not Known						
Select Services To Be Attached To This Room						
ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
708	5X20X8	SC-10	1 SINGLE NOCLIMATE	100	6/1/2001	\$29.95
DESCRIPTION						AMOUNT
<input type="checkbox"/> SAFESTOR \$10,000						\$18.00
<input type="checkbox"/> SAFESTOR \$15,000						\$24.00
<input type="checkbox"/> SAFESTOR \$4,000						\$6.00
<input type="checkbox"/> TEST DESCRIPTION DONT USE						10.00%
<input type="checkbox"/> CLEANING						\$25.00
<input type="checkbox"/> LOCK REMOVAL						\$50.00
<input type="checkbox"/> TEST 2 DONT USE						\$5.00
<input type="checkbox"/> TEST 3 DONT USE						\$10.00
<input type="checkbox"/> \$5 OFF FIRST MONTH						(\$5.00)




To complete the MOVE IN page using the mouse:

1. Review the NEXT BILL DATE field. The default is always a month from today.
2. If you want to change this date, click in the MONTH, DAY, or YEAR field and overtype.










Note: When the BILL DATE changes, the application automatically pro-rates the amount due a full-month plus the difference in days. In the above example, the current date is May 1, 2001. The default is set to the next month, which is June 1, 2001. If the customer wants to change the bill date to the fifth of the month, you would type 06/05/2001. A date earlier than June 1, 2001 generates


The pages for **ALTERNATE CONTACT** and **AUTHORIZED ACCESS** are identical to a **MOVE IN** contract without a reservation. Go to the [Alternate contact](#) to review these procedures.


When you get to the procedure on adding a room, click  to return to these procedures. Adding rooms on a reservation is slightly different from adding rooms on a standard move in.


Showing room on a move in from a confirmed reservation


The **AVAILABLE ROOMS** page shows the room you selected under **SELECTED ROOM AND SERVICES INFORMATION**.


Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑							
Available Rooms							
Input The Desired Room # 							
(Access Key: A)							
- OF -							
Select A Product Type 				Select A Room Size 			
(Access Key: D)				(Access Key: V)			
- OF -							
Selected Room And Services Information							
	ROOM SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT	
	708	5X20X8	SC-10	1	SINGLE NOCLIMATE	100	5/1/2001
	RECURRING SERVICES						AMOUNT
	SAFESTOR \$10,000						\$18.00
 = Add Services To Room  = Delete A Room And/Or Services							

To edit room information and add services, click the picture frame icon  next to the room number.

To delete services, click on the flaming match icon  next to the recurring service you want to remove.

To remove the room and all services attached to it, click on the flaming match icon  next to the room number.

To change the room rental rate, click on the picture frame icon  next to the ROOM description. Click [here](#) to review procedures.

To change recurring services rates, click on the picture frame icon  next to the RECURRING SERVICES title. Click [here](#) to review procedures.

If you want to add another room, click [here](#) to review procedures.


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Adjusting rental amount

The picture frame icon next to the ROOM description is available if the RENT amount is not accurate.

Adjust The Room Rental Amount				
ROOM	SIZE	PRODUCT	DESCRIPTION	RENT
708	5X20X8	SC-10	1 SINGLE NOCLIMATE	29.95

(Access Key: B) (Access Key: S)


When you click the picture frame icon, the ADJUST THE ROOM RENTAL AMOUNT page displays. Type the correct amount in the RENT field and click  or press ALT + S.


Adjusting service item amount

The picture frame icon next to the RECURRING SERVICES description is available if service amounts are not accurate.

Adjust Service Item Amount				
DESCRIPTION	ROOM	START DATE	NEXT DUE	AMOUNT
SAFESTOR \$10,000	708	5/1/2001	5/1/2001	8.00

(Access Key: B) (Access Key: S)

When you click the picture frame icon, the ADJUST SERVICE ITEM AMOUNT page displays. Type the correct amount in the AMOUNT field and click  or press ALT + S.

After adding all rooms and making the necessary adjustments, click on  or press ALT + X to continue.

SECURITY GATE ACCESS and CREDIT CARD PAYMENT procedures are identical to the standard move in. Click [here](#) to review security gate access procedures. Click [here](#) to review credit card payment procedures.

Collecting additional money – move in from confirmed reservation

The FEES DUE page provides you with the balanced owed. The example on the right indicates that the customer owes \$26.94.

Click

to continue.

Review
payments for
procedure on
taking a payment.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
							↑
Fees Due							
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
5/1/2001	708	OVERPAY CREDIT				-\$29.95	
5/1/2001	708	RENT	\$29.95	1.13	\$2.71	\$36.55	
5/1/2001	708	SAFESTOR \$10,000	\$18.00	1.13	\$0.00	\$20.34	
Balance Due:							\$36.94

Ⓢ = Waiver Fee

(Access Key: A)

(Access Key: T)

Payments Collected				
TYPE	NUMBER	EXP. DATE	AMOUNT	
CASH	/		\$29.95	
Total Paid:				\$29.95

(Access Key: L)

(Access Key: M)

Once payment is taken, the application automatically goes to the RENTAL AGREEMENT page.

Refunding money – move in from a confirmed reservation

When you collect more money on the confirmed reservation than is needed on the move in, the application provides the amount of money to refund. Give the customer back the amount of money designated as CASH BACK.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
							↑
Fees Due							
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
Account Is Current, No Fees Due							
Balance Due:						\$0.00	
Ⓢ = Waiver Fee							
<div>Access Key: A</div>							
Payments Collected							
TYPE	NUMBER	EXP. DATE	AMOUNT				
CASH	/		\$29.95				
CASH	CASH BACK	/	(\$6.85)				
Total Paid:						\$23.10	
<div>Access Key: L</div> <div>Access Key: M</div>							

(Access Key: L)

(Access Key: M)

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Click [Main](#) to go the RENTAL AGREEMENT page.

The RENTAL AGREEMENT page recaps the complete contract. Notice under PAYMENT LEDGER that the amount of the deposit is subtracted

WebSelfStorage

RENTAL AGREEMENT



CONTRACT BALANCE DUE: \$0.00		ACCOUNT TYPE: INDIVIDUAL		CONTRACT NO: 990019-00000725	
Customer Information					
Alternate Contact					
Authorized Access Person(s)					
Room Information					
Room	Size	Status	Autopay	Bal Due	Moved In
708	5X20X8	CURRENT	NO	\$0.00	5/1/2001
				Next Due	Access Code
					NO
				Service Billing	Rate
					\$29.95
Services					
Credit Card Payment Plan - Optional					
Payment Ledger					
Pay Date	Receipt Number	Type	Number	Auth Code	Amount
5/1/2001 10:50:21 AM		CASH			\$26.94
5/1/2001 10:44:40 AM		CASH			\$29.95
5/1/2001 10:44:38 AM	990019-00000725-001	CASH	CASH BACK		(\$29.95)
Notes					

[Contract Page](#) [Main](#)

Reviewing account ledger after a move in from a reservation

If you want to review the ACCOUNT LEDGER before completing the contract, click on the [Payment Ledger](#) hypertext link.

The ACCOUNT LEDGER shows all reservation and move in transactions.

PAID	DUE	THRU	ROOM DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE
✓	5/2/2001	5/1/2001	6948 RENT DEPOSIT	\$29.95	1	\$0.00	\$29.95	\$29.95
\$	5/1/2001		DEPOSIT				(\$29.95)	\$0.00
✓	5/1/2001	5/1/2001	6948 RENT DEPOSIT (reversed)	(\$29.95)	1	\$0.00	(\$29.95)	(\$29.95)
\$	5/1/2001		REVERSED PAYMENT				\$29.95	\$0.00
✓	5/1/2001	6/4/2001	708 RENT	\$29.95	1.13	\$2.71	\$36.55	\$36.55
✓	5/1/2001	6/4/2001	708 SAFESTORE \$10.000	\$10.00	1.13	\$0.00	\$20.34	\$56.89
\$	5/1/2001		PAYMENT				(\$29.95)	\$26.94
\$	5/1/2001		CASH				\$26.94	\$0.00

\$ = View Payment Detail ✓ = Paid In Full ○ = Reserved Change ● = Waiver Selected Fee

[Take payment](#) [Main](#)
(Access Key: T) (Access Key: M)

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In the above example, the first two records were created at the time of the reservation. Notice a tentative room number was used on this reservation. The remaining records are created at the time the customer moves into the room.

The first record is the original reservation deposit charge.

The second record is the original reservation deposit payment.

The third record is reversing the original reservation deposit charge.

The fourth record is reversing the original reservation deposit payment.

The fifth record is the rent charge on the room the customer is moving into.

The sixth record is a SAFESTOR charge associated with the room the customer is moving into.

The seventh record is the original reservation deposit payment being applied to the move in charges.

The eighth record is the new payment collected at move in. It covers the remaining balance owed.

To see how the application matched payments to charges, click on the dollar sign \$ next to each payment record.

The first dollar sign shows the reservation payment.

Click on the next to the payment type to recall the receipt.

Click

to return to the ACCOUNT LEDGER page

Payments						
<input type="checkbox"/>	TYPE	ACCOUNT NO	EXP DATE	AUTH CODE	PAY DATE	AMOUNT
<input checked="" type="checkbox"/>	CASH		/		5/1/2001	\$29.95
TOTAL:						\$29.95

Above Payments Covered These Charges						
ROOM	SIZE	DESCRIPTION	RECORD DATE	PAID-THRU	FEE	
6948	20X5XB	RENT DEPOSIT	5/1/2001	5/1/2001	29.95	
TOTAL:						\$29.95
DIFFERENCE OF:						\$0.00

☒ - View And Print Receipt

Back
(Access Key: B)

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The fourth dollar sign shows the OVERPAY CREDIT and CASH collected on the move in being applied to the RENT and SAFESTOR charges.

Click

to return to the ACCOUNT LEDGER page.





Payments						
<input type="checkbox"/>	TYPE	ACCOUNT NO	EXP DATE	AUTH CODE	PAY DATE	AMOUNT
<input type="checkbox"/>	CASH	APPLIED OVERPAY CREDIT			5/1/2001	\$29.95
<input type="checkbox"/>	CASH				5/1/2001	\$26.94
TOTAL:						\$56.89

Above Payments Covered These Charges					
ROOM	SIZE	DESCRIPTION	RECORD DATE	PAID-THRU	FEE
708	20X5X8	RENT	5/1/2001	6/4/2001	36.5535
708	20X5X8	SAFESTOR \$10,000	5/1/2001	6/4/2001	20.34
TOTAL:					\$56.89
DIFFERENCE OF:					(\$0.00)

☐ View And Print Receipt

(Access Key: B)

To save the contract:

1. On the ACCOUNT LEDGER page, click  or press ALT + M.
2. On the RENTAL AGREEMENT page, click  or press ALT + S.
3. Click  on the message page that asks if you are ready to save.
4. Type your password into the pop-up window provided, if your location requires a secondary check to assure the person who starts the contract finishes it. Click  to complete the password check.

E-111

If the customer is not on your database, the first and last name are carried to the INDIVIDUAL CUSTOMER INFORMATION page. Click in the ADDRESS field and input the remaining information.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑							
Individual Customer Information							
First Name:		[REDACTED]		Last Name:		[REDACTED]	
Address:		[REDACTED]		Apt No:		[REDACTED]	
Address2:		[REDACTED]					
City:		[REDACTED]		State:		[REDACTED]	
Home Phone:		[REDACTED]		Ext:		[REDACTED]	
Work Phone:		[REDACTED]		Ext:		[REDACTED]	
SS# or Secondary ID:		[REDACTED]					
Driver Lic. or State ID:		[REDACTED]		State:		[REDACTED]	
Employer Name:		[REDACTED]		Phone:		[REDACTED]	
E-Mail Address:		[REDACTED]					
Tax Exempt		<input type="checkbox"/>		Number:		[REDACTED]	

If the customer is found, all customer information displays on this page.

If the customer record is not new, click [here](#) to continue.

If the customer record is new, click [here](#) to continue.

Advanced search feature



The SEARCH CUSTOMER INFORMATION page provides an advanced search feature. This page requires you input a piece of information about the customer. The gray lines indicate the separate search criteria.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑							
Search Customer Information							
E-Mail Address:		[REDACTED]					
Unique Customer ID No:		[REDACTED]					
First Name:		[REDACTED]		Last Name:		[REDACTED]	
State:		[REDACTED]		City:		[REDACTED]	
Social Security or Secondary ID:		[REDACTED]					
Phone Number:		[REDACTED]		[REDACTED]		[REDACTED]	
Driver's License or State ID No:		[REDACTED]					

(Access Key: E) (Access Key: F)

E-114



The search feature is very flexible. One or more fields must be filled in before beginning the search. You can:

Type the *customer's first and/or last name*, or a *partial first and/or last name*.

Type a *city and/or select a state*.

Type the *customer's social security number*, or other *secondary identification number*.


Type the *customer's phone number*

Type the *customer's driver's license number*.

If the customer has a *unique customer ID number*, you can also type this information.

In addition, if the customer's *E-Mail address* was recorded on the last rental transaction, this information can be typed in and the customer information can be recalled.

To input search criteria and activate the search feature:

1. Click in the field the customer has given you information.
2. Type this *information*. For this example, I typed **Frank** in the **FIRST NAME** field.
3. Click  or press ALT + F.

An
INDIVIDUAL
CUSTOMER
RESULTS
page displays
all customers
with the first
name of Frank.


Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑							
Individual Customer Results							
NAME	PHONE	ADDRESS	CITY	STATE	ZIP		
<input type="checkbox"/> FRANK BOE	(802)881-4116	3402 N 27TH ST #612	PROVENCE	AK	93016		
<input type="checkbox"/> FRANKLIN D BOE	(802)884-1477	3402 N 48TH PLACE	PROVENCE	AK	93016		
<input checked="" type="checkbox"/> = Select The Customer							
							
(Access Key: B)		(Access Key: A)					




If the customer information is NOT present, click on  or press ALT + A.



Click [here](#) to continue with procedure on adding a new customer.

If the customer information appears in the list, click on the blue arrow icon  next to the customer's name, or press TAB until the cursor is over the blue arrow icon and press ENTER. Continue with instructions below.

If you want to return to the search function and enter new information, click

 or press ALT + B.

The
INDIVIDUAL
CUSTOMER
INFORMATION
page displays.
Make sure the
customer
information is
still current
before
continuing.
Overtyping any
field that needs
to be updated.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑ IMPORTANT, Please Verify Customer's Information! ↓							
Individual Customer Information							
First Name:		Last Name:					
Address:		Apt No:					
Address2:							
City:		State:		Zip:			
Home Phone: () - -		Ext:					
Work Phone: () - -		Ext:					
SS# or Secondary ID:							
Driver Lic. or State ID:		State:		Exp Date: /			
Employer Name: NOVA		Phone: () - -					
E-Mail Address:							
Tax Exempt Number:							



Since we now have a corporate-wide database, it is important to make sure the customer information is current and accurate.

To save customer information and continue with transaction:

1. Click or press ALT + X.



Click [here](#) to continue with the contract.

Adding a new customer



If the customer is renting from U-Haul for the first time, or you could not find the customer's information by using the advanced search function, you can add this customer to the database.

An example of the
INDIVIDUAL
CUSTOMER
INFORMATION
page after
inputting the
customer
information.

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

↑

Individual Customer Information

First Name: [REDACTED] Last Name: [REDACTED]

Address: [REDACTED] Apt No: [REDACTED]

Address2: [REDACTED]

City: [REDACTED] State: [REDACTED] Zip: [REDACTED]

Home Phone: ([REDACTED]) [REDACTED] Ext: [REDACTED]

Work Phone: ([REDACTED]) [REDACTED] Ext: [REDACTED]

SS# or Secondary ID: [REDACTED]

Driver Lic. or State ID: [REDACTED] State: [REDACTED] Exp Date: [REDACTED] / [REDACTED]

Employer Name: [REDACTED] Phone: ([REDACTED]) [REDACTED] Ext: [REDACTED]

E-Mail Address: [REDACTED]

Tax Exempt ☐ Number: [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]




On this page, a field with a blue background is a required field. The customer must provide this information if they want to rent with U-Haul.

A field with a green background requires information in one of two informational fields:

If the customer wants to provide their *social security number*, a *credit card number*, or a *state or military identification number*, then type this information in the SS # OR SECONDARY ID field.

If the customer wants to provide their *driver's license information*, then type it in the fields provided.

To add a customer to U-Haul's database:

1. Type the *customer's information* in the appropriate field.
2. Click in the next field, or press TAB to move to the next field.
3. Repeat steps 1 and 2 until all required information is input.
4. Press  or press ALT + X to continue.




There are several important rules governing alternate contact. These rules are needed to assure a separate contact person can be reached in case the customer is unavailable. An alternate contact cannot:

Live at the same address as the customer.

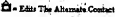
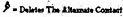




Have the same name as the person renting the room.

Have the same phone number as the customer.

To add an alternate contact:

1. Type the *proper information* in each field.
2. Press TAB or click in the next field.
3. Repeat steps 1 and 2 until all required fields have input.
4. Click  or press ALT + S to continue.

The
ALTERNATE
CONTACT
page
redispays.
Notice the
contact you
added is now
listed on this
page.

Customer	Contact	Access Users	Room	Olds Access	Payment Plan	Invoicing	Payment
↑							
To Assure Notification In Case Of Fire, Flood, Burglary or Break-In							
NAME		PHONE		ADDRESS		CITY	STATE ZIP
JAMES MCGUIRE		(602)928-2983		4233 N. 16TH STREET		PHOENIX	AZ 85032
 = Edit The Alternate Contact  = Delete The Alternate Contact							
 (Access Key: A)							
   (Access Key: C) (Access Key: B) (Access Key: X)							




Add another contact by clicking  or pressing ALT + A.

Edit the existing contact by clicking  next to the contact's name.


Delete the existing contact by clicking  next to the contact's name.

Return to the customer page by clicking  or pressing ALT + B.

Cancel the contract by clicking  or pressing ALT + C.

Continue to the next page of the contract by clicking  or pressing ALT + X.

To input the room number directly:

1. Type the *room number* in the field with the title INPUT THE DESIRED ROOM #.
2. Click  or press ALT + A.



Click [here](#) to continue with the contract.

Selecting a specific product type




Select A Product Type



(Access Key: D)

To search the PRODUCT TYPE for a room:

1. If the customer wants a specific room type, but is unsure of the specific room, scroll down the list of product types.
2. Click on the PRODUCT TYPE the customer wants to rent.
3. Click on  or press ALT + D.

All rooms that fit this product type display in a list.

If the customer does not want any of the rooms on this list, or no rooms are listed, click



to return to the AVAILABLE ROOMS page.

Customer Contact Access Users Room **Room** Date Access Payment Plan Invoicing Payment

Select The Desired Room From The List Below

ROOM	SIZE	PRODUCT	DESCRIPTION	RATE
<input type="checkbox"/> 115	10X10X3	INTERIOR	1 SINGLE NOCLIMATE	\$48.61
<input type="checkbox"/> 23	10X10X3	INTERIOR	1 SINGLE NOCLIMATE	\$48.61
<input type="checkbox"/> 458	10X10X3	INTERIOR	1 SINGLE NOCLIMATE	\$48.61
<input type="checkbox"/> 4567	10X15X3	INTERIOR	8 UPPER CLIMATE	\$99.95
<input type="checkbox"/> 545	10X15X3	INTERIOR	8 UPPER CLIMATE	\$99.95
<input type="checkbox"/> 553	10X15X3	INTERIOR	8 UPPER CLIMATE	\$99.95
<input type="checkbox"/> 566	10X15X3	INTERIOR	8 UPPER CLIMATE	\$99.95
<input type="checkbox"/> 8788	10X15X3	INTERIOR	8 UPPER CLIMATE	\$99.95
<input type="checkbox"/> R0002A	10X15X3	INTERIOR	8 UPPER CLIMATE	\$99.95

☐ - Selects The Room ☐ - View Combined Room Information



(Access Key: B)

E-123

Completing room input



Each room requires a **BILL DATE** and the adding of any services.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑							
Input The Next Bill And Expected Vacate Date							
Next Bill Date: <input type="text"/> / <input type="text"/> / <input type="text"/>							
Edit Date If Customer Request A Different Bill Date							
Vacate Date: <input type="text"/> / <input type="text"/> / <input type="text"/>							
Leave Blank If Vacate Date Is Not Known							
Select Services To Be Attached To This Room							
ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT	
558	10X5X8	SC-10	1 SINGLE NOCLIMATE	50	4/26/2001	\$39.95	
						DESCRIPTION	
						AMOUNT	
<input type="checkbox"/> SAFESTOR \$10,000						\$18.00	
<input type="checkbox"/> SAFESTOR \$15,000						\$24.00	
<input type="checkbox"/> SAFESTOR \$4,000						\$6.00	
<input type="checkbox"/> EXTENDED ACCESS						\$8.00	
<input type="checkbox"/> \$1 MOVE IN DISCOUNT						(\$1.00)	
<input type="checkbox"/> 20% SYSTEM MEMBER DISCOUNT						(20.00)%	
<input type="checkbox"/> 50% OFF FIRST MONTH						(50.00)%	
<input type="checkbox"/> ONE MONTH FREE						(100.00)%	
<input type="checkbox"/> 24-HR ACCESS						\$5.00	

To complete room input:

1. Ask the customer if they want their next bill date to be the date shown in the **NEXT BILL DATE** field. If they want to change it, you must advance the date forward. The customer must pay one month, plus the number of days in advance.

For example: The above example shows a default bill date of 4/26/01 (April 26, 2001). If the customer wants to be billed on the first of each month, change the date to 5/01/01 (May 1, 2001). The customer will be billed one month plus four days.

2. Click on the check box next to any service or discount the customer wants, or press TAB until the cursor is over the check box. Press the SPACEBAR to check the box.
3. Click ☐ or press ALT + S to continue.

E-126

Completing available rooms page



The AVAILABLE ROOMS page redispays. The room and services you selected now shows under SELECTED ROOM AND SERVICES INFORMATION.

Available Rooms

Input The Desired Room #
(Access Key: A)

- or -

Select A Product Type

(Access Key: D)

Select A Room Size

(Access Key: V)

- or -

Selected Room And Services Information

ROOM SIZE	PRODUCT DESCRIPTION	SQ.FT.	BILL	RENT
558 10X5X8 SC-10	1 SINGLE NOCLIMATE	50	3/26/2001	\$39.95
RECURRING SERVICES				AMOUNT
SAFESTOR \$10,000				\$18.00

⏏ Add Services To Room
⏏ Delete A Room And/Or Services

(Access Key: C) (Access Key: B) (Access Key: X)

This page provides you with a way to:

Edit the room information by clicking the picture frame icon next to the room number. Click on this when you want to add more services.

Delete the room by clicking the flaming match icon next to the room number. This removes the room and all services associated with this room.

Delete a service by clicking the flaming match icon next to the service. This removes the service from the contract.

Changing the charge amount on a service



The ADJUST SERVICE ITEM AMOUNT page displays. All services selected for the room appear in this list.

Click on the picture frame icon next to the RECURRING SERVICES if you need to change an amount charged for services.

Adjust Service Item Amount

DESCRIPTION	ROOM	START DATE	NEXT DUE	AMOUNT
SAFESTOR \$10,000	558	3/26/2001	3/26/2001	\$18.00

(Access Key: B) (Access Key: S)

To change an amount charged for a service:

E-127

Collecting fees due



When doing a MOVE IN without a RESERVATION, the FEES DUE page enables you to review all fees the customer is responsible for paying before they can move into the room.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
Fees Due							↑
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
3/26/2001	558	RENT	\$39.95	1.00	\$3.60	\$43.55	
3/26/2001	558	SAFESTOR \$10,000	\$20.00	1.00	\$0.00	\$20.00	
Balance Due:							\$63.55
<div> <div>Access Key: A</div> <div>Access Key: T</div> </div> <div> <div>Access Key: L</div> <div>Access Key: M</div> </div>							

Reviewing fees due when moving in with a confirmed reservation



When completing a MOVE IN using a CONFIRMED RESERVATION, the FEES DUE page is different.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
Fees Due							↑
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
3/28/2001	553	OVERPAY CREDIT			-\$65.35		
3/28/2001	553	RENT	\$99.95	1.00	\$9.00	\$108.95	
3/28/2001	553	SAFESTOR \$10,000	\$18.00	1.00	\$0.00	\$18.00	
Balance Due:							\$61.60
<div> <div>Access Key: A</div> <div>Access Key: T</div> </div>							
Payments Collected							
TYPE	NUMBER	EXP. DATE	AMOUNT				
CASH		/	\$65.35				
Total Paid:							\$65.35
<div> <div>Access Key: L</div> <div>Access Key: M</div> </div>							

Since a deposit was collect on the RESERVATION, the application applies this money to the MOVE IN, and provides you with the BALANCE DUE, or REFUND DUE in cases where more money was collected on the RESERVATION than is needed on the MOVE IN.

The FEES DUE page provides the following information:

A list of charges for each room.

The balance due on this contract.

Note: On a MOVE IN, U-Haul's business rule requires that you collect the

balance due.



The buttons on this page direct you to different pages. The following information gives you a recap of what happens when you press the individual buttons.


Adding future

Take payment

Ledger

Main

Adding future charges

Click  or press ALT + A if the customer wants to pay rent into the future.

The MONTHLY COST SPREADSHEET at the bottom of the page provides you with the total due for the time noted to the left. This charge includes all rent, taxes, and services associated with the room.

Customer Countert Access Usage Room Gate Access Payment Plan Invoicing Payment

Fees To Be Added				
ROOM	DESCRIPTION	FEE	TAX	TOTAL
558	RENT	\$39.95	\$3.60	\$43.55
558	SAFESTOR \$10,000	\$20.00	\$0.00	\$20.00

Total To Be Added: \$63.55

Monthly Cost Spreadsheet					
1 Month	\$63.55	4 Months	\$254.20	7 Months	\$444.85
2 Months	\$127.10	5 Months	\$317.75	8 Months	\$508.40
3 Months	\$190.65	6 Months	\$381.30	9 Months	\$571.95
				10 Months	\$635.50
				11 Months	\$699.05
				12 Months	\$762.60

Click On The Dollar Amount To Add To The Customer's Contract

(Access Key: C)

To add future months:

1. Click the underlined dollar amount next to the months the customer wants to add. For Example: If the customer wants to pay the first six months on this rental, you already have one month charge listed above, click on \$317.75 to add an additional 5 months worth of charges to this customer's contracts. The total owed is now six months.

The application goes back to the FEES DUE page and requires you select the type of payment.

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To review information about the RENTAL AGREEMENT page, click [here](#).

Saving the contract


Once the customer pays the balance due on a MOVE IN, or makes some form of payment from within the TAKE PAYMENT selection, the save function is available.


To save a contract:

1. Click  or press ALT + S.




A pop-up window asks if you are sure you are ready to save.

If you are ready to save the contract, click  or press ENTER with the cursor over the OK button.

If you are NOT ready to save the contract, click on , or press TAB and then press ENTER to move the cursor over the CANCEL button and then select it.



When you select CANCEL above, a follow up message may appear informing you that an invalid password was entered. Click on  or press ENTER to continue.

When you okay the save feature, the application displays the receipt page.

This is an
example of a
customer's
receipt.

Customer Receipt No:
990019-00000104-001
FRANK SLAVEN
2389 N PUEBLO DR
TUCSON, AZ 85722
(520)46-1704

Monday - 3/26/2001 - 1:29:06 PM

CMID DALLAS, 990019
920 MEYERS ROAD
GRAND PRAIRIE, TX 75050
(000)000-0000

ROOM	DESCRIPTION	THRU	PAID	AMOUNT
558	10X52X SC-10 1 SINGLE NOCLIMATE	4/25/2001	✓	\$39.95
558	SAFESTOR \$10,000	4/25/2001	✓	\$20.00
558	10X52X SC-10 1 SINGLE NOCLIMATE	5/25/2001	✓	\$39.95
558	SAFESTOR \$10,000	5/25/2001	✓	\$20.00
558	10X52X SC-10 1 SINGLE NOCLIMATE	6/25/2001	✓	\$39.95
558	SAFESTOR \$10,000	6/25/2001	✓	\$20.00

Paid Total:	\$179.85
Unpaid Total:	\$0.00
Tax TX 9.00%:	\$10.80
Fee Total:	\$190.65

CASH	\$127.10
CASH	\$63.55
Payment Total:	\$190.65
Account Balance:	\$0.00


X

Customer's Signature

X


Employee's Signature

(Access Key: O)

To print this receipt, click  on the menu bar. The application sends one copy to the printer. If you need more than one copy, simply click on the print icon as many times as you need copies.

This receipt is stored on the ACCOUNT LEDGER page, and can be retrieved and reprint at any time throughout the life of this rental contract.

Make sure the customer and the employee completing the contract both sign the paper contract.

After giving a copy of the receipt to the customer and making sure you have all the copies you need for your files, click  to close the page.

To review how to retrieve a receipt after you have closed the contract, click [here](#).

E-137

Taking payment



When an existing customer either sends or comes in and makes payment on the rental, you must record this payment.

Unlike the MOVE IN contract, the application allows you to take a payment for less than the balance due. Payments are applied first to the rental amount, then to services and lastly to delinquency and other fees.

Existing Customer

Take A Payment

Move Out

View Contract

Transfer

Since this is an existing customer, click on TAKE A PAYMENT under the EXISTING CUSTOMER on the HOME page.



The search feature is exactly like the one used on the VIEW CONTRACT selection. To review procedure on finding a contract click [here](#).

Reviewing customer status



Charges are applied to a customer's account on his or her anniversary or due date. In most cases, your customer sends in or makes payment before this anniversary date. Because of this, you need to review the customer's FEES DUE page to see if the customers due date was prior to today's date.

- If the customer's due date is in the future, then the nightly batch process has not applied current charges. You must add FUTURE CHARGES to this contract.
- If the customer's due date is before today's date, then nightly batch has applied the charges.

Add future charges




In this example, the customer is paying before his or her bill date. Notice the BALANCE DUE is zero.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
							↑
Fees Due							
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
Account Is Current, No Fees Due							
Balance Due:							\$0.00

Access Key: A) Access Key: F)


Access Key: L) Access Key: M)

E-139

When a customer is paying before his or her due date, begin by clicking  or press ALT + A to add the charge that the customer is paying for. Review Adding Future Charges.

Adding a fee



On occasion, you may have to add a fee that is not listed under room charges. You can do this by clicking on  or pressing ALT + F.






It is very important to understand that ADD-FEE does not replace the sales invoice screen within BEST.


Do not record the sale of locks and other resale inventory from this page. If you do, you cause incorrect inventory counts within BEST. *WebSelfStorage* does not relieve BEST inventory. Sales of locks and other resale items MUST be done from the SALES INVOICE screen within BEST.

If the customer has more than one room, the application provides you with a page to select the room you want the fee attached to.

Enter Manual Fee Information			
Select A Room To Apply Fee			
ROOM	SIZE	PRODUCT	DESCRIPTION
<input checked="" type="radio"/> 903	5X5X8	SC-10	2 SINGLE NOCLIMATE
<input type="radio"/> 939	5X5X8	SC-10	2 SINGLE NOCLIMATE

Enter Fee Description, and Amount Below	
DESCRIPTION	AMOUNT
	


(Access Key: C)


(Access Key: S)

To add a fee when there is more than one room:

1. Click on the radio button beside the room you are adding this fee.
 2. Click in the DESCRIPTION field.
 3. Type the fee description.
 4. Press TAB.
 5. Type the amount of this fee.
- Note: No tax is assessed on these fees. Make sure you include the total amount including tax when applicable.

E-140

Charge already added

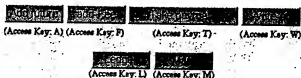


In this example, the customer's due date is the 13th of the month. The rent charge was applied and because the customer is late, delinquency fees are included in the balance.

Customer Contact Access Users Room Date Access Payment Plan Invoicing Payment

Fees Due							
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
3/13/2001	939	RENT	\$19.99	1.00	\$1.60	\$21.59	
3/13/2001	903	RENT	\$19.99	1.00	\$1.60	\$21.59	
3/16/2001	939	1ST STAGE DELINQUENCY FEE	\$15.00	1.00	\$0.00	\$15.00	
3/16/2001	903	1ST STAGE DELINQUENCY FEE	\$15.00	1.00	\$0.00	\$15.00	
3/26/2001	939	2ND STAGE DELINQUENCY FEE	\$15.00	1.00	\$0.00	\$15.00	
3/26/2001	903	2ND STAGE DELINQUENCY FEE	\$15.00	1.00	\$0.00	\$15.00	

Balance Due: \$108.17



For a payment, you have several options:

- Record a customer's payment by clicking on or pressing ALT + T. Continue by reviewing Payments.
- Waiver a fee by clicking on the yellow icon or pressing TAB until the cursor is over this icon. Once the cursor is over the icon, press ENTER to select. Continue by reviewing Recording waivers.
- Write-off any existing charges by clicking on or pressing ALT + W. Continue by reviewing Writing off a charge.
- Review the customer's history by clicking on or pressing ALT + L. Continue by reviewing Account Ledger.
- Go to the RENTAL AGREEMENT page by clicking on or pressing ALT + M. Continue by reviewing Rental Agreement.

NOTE: Always, complete waivers and write offs before taking payment.

After recording all payments, write-offs, and waivers, save the contract. Continue by reviewing Saving The Contract.

Recording waivers





Always complete waivers before collecting payment.

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When you click on , the application asks if you are sure.



Click  or press ENTER if you want to remove this fee.

Click  or press TAB, ENTER if you want to cancel and leave the fee as is.

Writing off a charge



Always complete write offs before collecting payment.




The application displays all unpaid charges and services.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Write-off
Select Fees To Write-off							
<input type="checkbox"/>	DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
<input type="checkbox"/>	3/21/2001	977	RENT	\$19.99	1.00	\$1.60	\$21.59
<input type="button" value="Select All"/> <input type="button" value="UnSelect All"/>							Balance Due: \$21.59
				<input type="button" value="WRITE OFF"/>	<input type="button" value="NEXT"/>		
				(Access Key: C)	(Access Key: X)		



You can write-off charges in several ways:

- If you want to write-off the complete list of charges, click on Select All. If you select all by mistake, you can click UnSelect All to uncheck all boxes.
Note: If you select more than one charge, you will not be able to adjust the amount of the write-off. When only a portion of several charges needs to be written off, complete the write-off of each charge separately. To do this, check the box next to one of the charge. Click the next button and complete the next page. Once the write-off of the first charge is done, click on the write-off button again and select the other charge.
- If you want to write-off selective charges, click on the check box next to the charges you want to write-off. You can also press TAB until the cursor is over the check box. Press the SPACEBAR to check the box.

Click on  or press ALT + X to continue.

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Moving out



When a customer is vacating their storage room, complete a move out contract.

A move out contract is also necessary after the auction process to close the customer's contract and return the room to available status.

There are three different move out scenarios:

- A customer owes money
- A customer is paid up
- A customer is paid in advance.

Within each move out scenario, you may also charge the customer additional fees for such things as cutting the lock, cleaning fees, and/or dumpster fees.

Taking care of balances owed




If the customer has outstanding charges and fee, complete TAKE A PAYMENT contract before doing the MOVE OUT.

To collect on balances owed or write-off charges on a contract:

1. Click on TAKE A PAYMENT from the HOME PAGE under EXISTING CUSTOMERS.
2. Recall the contract. Review procedure on VIEWING A CONTRACT already covered within Customer contracts.



When you get to the FEES DUE page, click  to return to this page.

The FEES DUE page shows all rent, services, and fees not yet paid.

Customer	Contract	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
Fees Due							
DUE	ROOM	DESCRIPTION	DATE	QTY	TAX	TOTAL	
		OVERPAY CREDIT				-\$3.15	
3/28/2001	565	RENT		\$39.95	1.00 \$3.20	\$43.15	
3/29/2001	565	1ST STAGE DELINQUENCY FEE		\$15.00	1.00 \$0.00	\$15.00	
Balance Due:						\$58.00	

(Access Key: A) (Access Key: B)

(Access Key: T)

(Access Key: W)



(Access Key: L) (Access Key: M)

To waiver a delinquency fee:

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1. Click on the yellow bullet icon ● next to the delinquency fee. A pop-up message asks if you are sure you want to waive this fee.



2. Click  to remove the fee, or  to return to the page without removing the fee.



To write-off existing charges:

1. Click on .
2. Review write-off procedure.



Waivers and write offs must be done before taking payment.



To collect payment:

1. Click on .
2. Review payment procedure.

To complete the contract:

1. Review completing contract procedures.

Finishing the move out



Once all existing rental fees, services and delinquencies are taken care of within the TAKE A PAYMENT contract, you are ready to complete the move out.

Existing Customer

Take A Payment

Move Out

View Contract

Transfer

Start the move out by clicking on the corresponding name, MOVE OUT, under EXISTING CUSTOMER.


You can also press TAB until the cursor is over MOVE OUT, and then press

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ENTER to select.



Recalling a contract uses the same procedure as VIEWING A CONTRACT already covered within customer contracts. Click [here](#) if you need to review these procedures. Follow that procedures until the AVAILABLE ROOMS page

displays, return to these instructions by clicking on 


Viewing available rooms move out page

The AVAILABLE ROOMS MOVE OUT page is slightly different from the MOVE IN or TAKE A PAYMENT page. Notice the picture frame icon  next to the room number. Click on this icon to start the move out process.


Customer Contact Access Users Room **Room** Old Access Payment Plan Invoicing Payment


↑

Available Rooms

Input The Desired Room #  (Access Key: A)


- OF -


Select A Product Type  (Access Key: D)



Select A Room Size  (Access Key: V)


- OF -

Selected Room And Services Information

ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT	
	522	5X5X8	SC-10	2 SINGLE NOCLIMATE	25	3/19/2001	\$19.99

 RECURRING SERVICES AMOUNT

 = Add Move Out Services To Room  = Move Out Of Room / Delete A Service

 (Access Key: B)

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A list of charges associated with a move out contract display. Click on any of the services that you want to charge the customer. Click

 to continue.

Select Any Move Out Service Fees That Apply To Room 975						
ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
975	5X5X8	SC-10	2 SINGLE NOCLIMATE	25	5/3/2001	\$19.99
						AMOUNT
<input checked="" type="checkbox"/> CLEANING						\$25.00
<input type="checkbox"/> LOCK REMOVAL						\$15.00
<input type="checkbox"/> SALE ADVERTISING						4.00%
<input type="checkbox"/> \$1 MOVE IN DISCOUNT						(\$1.00)
<input type="checkbox"/> \$5 OFF FIRST MONTH						(\$5.00)
<input type="checkbox"/> 1 MONTH FREE						(100.00)%
<input type="checkbox"/> 20% SYSTEM MEMBER						(20.00)%
<input type="checkbox"/> 50% OFF FIRST MONTH						(\$0.00)%
<input type="checkbox"/> TEST						(3.00)%
<input type="checkbox"/> TEST AGAIN						(4.00)%
<input type="checkbox"/> 24-HR ACCESS						\$5.00

 
(Access Key: B) (Access Key: X)

If you selected additional service fees, continue below.

If you did not select additional service fees, click [here](#) to view procedure on completing the move out with no additional fees.

Completing contract with additional service fees



The FEES DUE page displays.

Customer	Contact	Access Users	Room	Date Access	Payment Plan	Invoicing	Payment
							↑
Fees Due							
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
4/3/2001	975	CLEANING	\$25.00	1.00	\$0.00	\$25.00	
Balance Due:						\$25.00	

 (Access Key: A)

 (Access Key: F)

 (Access Key: T)

 (Access Key: W)

 (Access Key: L)

 (Access Key: M)







To collect payment:

1. Click on 
2. Review payment procedure.




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After taking a payment, the application returns to the FEES DUE page. Click on  to display the RENTAL AGREEMENT page.







Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑							
Fees Due							
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
Account is Current, No Fees Due							
Balance Due:						\$0.00	
<div><div></div><div></div></div> (Access Key: A) (Access Key: F)							

Payments Collected				AMOUNT
TYPE	NUMBER	EXP. DATE		
CASH	/			\$23.00
Total Paid:				\$23.00
  (Access Key: L) (Access Key: M)				

If the customer wants a printout of their rental history, and/or you would like a recap for your files:

1. Click .
2. Click , on the LEDGER page.
3. After printing ledger information, click  to go to the RENTAL AGREEMENT page.

To complete the MOVE OUT, click on the ROOM INFORMATION link.

WebSelfStorage	RENTAL AGREEMENT	   
CONTRACT BALANCE DUE: \$0.00 ACCOUNT TYPE: INDIVIDUAL CONTRACT NO: 999019-00000071		
!! Customer Information		
!! Alternate Contact		
!! Authorized Access Person(s)		
!! Room Information		
!! Services		
!! Credit Card Payment Plan - Optional		
!! Payment Ledger		
  (Access Key: Q) (Access Key: S)		

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The
AVAILABLE
ROOMS
MOVE OUT
page
redisplays.
Now you are
ready to
complete the
move out.
Click on the
picture frame
icon next to
the room
number.
Continue with
procedures
below.

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

↑

Available Rooms

Input The Desired Room # (Access Key: A)

- or -

Select A Product Type (Access Key: D)

Select A Room Size (Access Key: V)

- or -

Selected Room And Services Information

ROOM SIZE	PRODUCT DESCRIPTION	SQ.FT.	BILL	RENT	
922	5X5X8 SC-10	2	SINGLE NOCLIMATE	3/19/2001	\$19.99
RECURRING SERVICES				AMOUNT	

⏏ = Add Move Out Services To Room ⏏ = Move Out Of Room / Delete A Service

(Access Key: B)

Completing the contract with no additional service fees


On the
SELECT
ADDITIONAL
SERVICE
FEES page, if
you do not
check any of
the boxes, and
the customer is
current, when
you click

to continue....

Select Any Move Out Service Fees That Apply To Room 131

ROOM SIZE	PRODUCT DESCRIPTION	SQ.FT.	BILL	RENT	
131	5X5X8 SC-10	1	SINGLE NOCLIMATE <u>BONUS</u>	4/15/2001	\$99.95

DESCRIPTION	AMOUNT
<input type="checkbox"/> CLEANING	\$25.00
<input type="checkbox"/> LOCK REMOVAL	\$50.00
<input type="checkbox"/> \$1 MOVE IN DISCOUNT	(\$1.00)
<input type="checkbox"/> 20% SYSTEM MEMBER	(20.00)%
<input type="checkbox"/> 50% OFF FIRST MONTH	(50.00)%
<input type="checkbox"/> ONE MONTH FREE	(100.00)%
<input type="checkbox"/> 24-HR ACCESS	\$5.00
<input type="checkbox"/> DUMPSTER	\$20.00

(Access Key: B) (Access Key: X)

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.... the
AVAILABLE
ROOMS page
redispays.
Since the
customer is
moving out of
the room, all
you need to do
is click

to continue.

Customer Contact Access Users Room Onsite Access Payment Plan Invoicing Payment





↑


Available Rooms

Input The Desired Room #  (Access Key: A)






- or -

Select A Product Type Select A Room Size

  (Access Key: D) - or -   (Access Key: V)



 (Access Key: B)

The RENTAL
AGREEMENT
page displays.
Click the down
arrow ↓ next to
ROOM
INFORMATION.
Notice there are
no rooms
associated with
this contract.

WebSelfStorage RENTAL AGREEMENT     

CONTRACT BALANCE DUE: \$0.00 ACCOUNT TYPE: INDIVIDUAL CONTRACT NO: 990019-00000031

!! Customer Information
!! Alternate Contact
!! Authorized Access Person(s)
!! Room Information
!! Services
!! Credit Card Payment Plan - Optional
!! Payment Ledger


 (Access Key: C)  (Access Key: S)

Notice that the SERVICES, CREDIT CARD PAYMENT PLAN, and PAYMENT LEDGER are not underlined. You can no longer access these pages.

To save the MOVE OUT, click 
or

To cancel the MOVE OUT, click 


When you save a contract, the application displays a message asking if you are sure.

Click  if you are ready to save.

Microsoft Internet Explorer

? ARE YOU READY TO SAVE?

Click  if you want to return to the contract.

Moving out with advance rent paid



In some case, the customer may have paid a few months in advance. According to U-Haul's rental agreement, all unused full-months of rent and services must be refunded to the customer.

Existing Customer

Take A Payment

Move Out

View Contract

Transfer

Start the move out by clicking on the corresponding name, MOVE OUT, under EXISTING CUSTOMER.

You can also press TAB until the cursor is over MOVE OUT, and then press ENTER to select.



Recalling the contract uses the same procedure as VIEWING A CONTRACT already covered within customer contracts. Click [here](#) if you need to review these procedures. Follow that page's procedures until the AVAILABLE

ROOMS page displays, return to these instructions by clicking on

The AVAILABLE ROOMS page displays with the room information at the bottom of the page.

Click on the flaming match icon to the left of the room number.

Customer	Contact	Access Users	Room	Date Access	Payment Plan	Invoicing	Payment
Available Rooms							
Input The Desired Room # <input type="text"/> (Access Key: A)							
- OF -							
Select A Product Type <input type="text"/>				Select A Room Size <input type="text"/>			
(Access Key: D)				(Access Key: V)			
Selected Room And Services Information							
ROOM SIZE	PRODUCT DESCRIPTION	SQ.FT.	BILL	RENT			
163	5X20X3 SC:10	1	SINGLE NOCLIMATE	100	9/1/2001	\$29.95	
RECURRING SERVICES							AMOUNT
Add Move Out Services To Room Move Out Of Room / Delete A Service							
(Access Key: B)							

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